

ITSP USER'S GUIDE

ESTABLISHING AND UTILIZING INFORMATION TECHNOLOGY SERVICES PROGRAM (ITSP) SUPPORT

REVISION E – 11 MAY 01

REVISIONS

Revision E – 11 May 01

1. General: Replace references to AFMC FAR Sup 5337.91 with AFI 63-124.
2. Para 4.6: Add Business Case Analysis (BCA) requirement.
3. Para 7.3.1.4: Reserve this paragraph and add content to Para 7.3.9.
4. Para 7.3.1.6: Clarify content regarding approved ITSP DDD.
5. Para 7.4.1.1: Add reference to BCA.
6. Para 7.4.2: Add content regarding increases to existing task orders.
7. Atch 6: Delete content regarding Activity Based Management.

Revision D – 31 Jan 00

1. Para 7.3.1.4: Change Functional Area “DI” to “XP.”
2. Atch 6: Change format of ESC/XP email addressees. Add Activity Based Management (ABM) Initiative paragraph to Block 16.

Revision C – 11 Jun 99

1. Para 5.1.3.1: Add reference to FAE appointment and designation letters.
2. Para 5.1.3.2: Add sentence re: FAE training.
3. Para 5.1.3.4: Delete “quarterly” from “quarterly/semi-annual review.”
4. Para 5.2.5: Revise contents of FAE Surveillance Folder.
5. Para 5.2.9: Change “ESC/XPK” to “FAC.”
6. Para 7.3.1.5: Add reference to Atch 8
7. Atch 5: Revise FAE Designation Letter, Surveillance Plan and Surveillance Log
8. Atch 8 – Add A&AS Codes

Revision B – 19 Apr 99

1. Para 7.3.1.4: Add requirement to submit number of hours per Functional Grouping.
2. Para 7.3.1.5: Add requirement to include A&AS Code on funding document.
3. Para 7.3.2: Add sentence re: ITSP Review Checklist.
4. Para 7.3.9: Add sentence re: ITSP Review Checklist.
5. Atch 5 – Surveillance Plan: Delete reference to “evaluation checklist” and replace with “surveillance log.”
6. Atch 7 – Add ITSP Review Checklist.

Revision A – 3 Feb 99

1. Para 7.3.1.1 – SOO: Add FAE name & phone number requirement.
2. Atch 5 - FAE Appointment/Designation Letters: Revise “Subject” line.

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ESTABLISHING AND UTILIZING INFORMATION TECHNOLOGY SERVICES PROGRAM (ITSP) SUPPORT

The policies, procedures, and responsibilities for establishing and utilizing Information Technology Services Program (ITSP) support at the Electronic Systems Center (ESC) are outlined in this document. It applies to all assigned or attached ESC activities.

1. Background.

1.1. Advisory and Assistance Services (A&AS). DODD 4205.2 explains that the acquisition of A&AS is a legitimate way to support services and operations. Organizations may use A&AS to help managers achieve maximum effectiveness or meet mission requirements. A&AS may be appropriate to use when (1) in-house capability is not available and cannot be developed in time to meet the requirements, or (2) the performance period is of short-term duration. However, A&AS cannot be used to perform inherently Governmental functions. Appropriately record and report all A&AS obligations, expenditures, and transactions. DODD 4205.2 requires ESC/FM to post a two-character alpha code at the end of each accounting fund cite for A&AS acquisitions; AF Policy Directive 63-4 and AFI 63-401 provide additional guidance. Contracting officers must ensure that A&AS codes are identified and properly entered on each applicable contractual document.

1.2. Program Description. The ITSP is ESC's centrally managed A&AS contracting program that utilizes decentralized order execution. ITSP will encompass virtually all previous Systems Engineering and Technical Assistance (SETA) contracts used by Hanscom AFB (i.e., Specialized Cost Service (SCS), Technical and Engineering Management Support (TEMS), Joint Test Force (JTF) except for Joint Stars, and Stanley Computer Systems Incorporated (SCSI)), and the majority of SETA contract vehicles used by ESC's Geographically Separated Units (GSU)

1.2.1. ITSP will acquire non-personal Information Technology (IT) Services to provide systems acquisition support to ESC Program Offices (including GSUs) for development, acquisition, and test of command and control (C2) systems. ITSP contractors will not perform inherently Governmental functions as set forth at FAR 7.501. The types of services to be acquired under ITSP are assisting the Government in defining program requirements; resolving developmental, production, operational and technical problems; and preparing technical program documentation and specifications. ITSP contractors will be issued individual, program-unique orders addressing discrete technical tasks and contract data requirements.

1.2.2. ITSP contractors will not develop, fabricate or furnish hardware or mission software, nor in any way control or direct other contractors and their programs or Government employees/agencies. Additionally, the contractor(s) shall not prepare source selection plans, evaluation factors for award, instructions for proposal preparation or factors and standards.

2. Policy.

2.1. ESC/CC is responsible for the total manpower resource and, in that role, chairs the Resource Utilization Board (RUB). The 66th ABW and GSUs will determine the allocation within their organization subject to CC/RUB approval. Within Air Force or Air Force Material Command (AFMC) constraints, the RUB determines the aggregate resource allocations for ESC mission areas. The RUB

facilitates an active dialogue between functional managers and program directors in determining specific resource allocations among ESC organizations.

2.1.2. Unless otherwise exempted, a functional office is responsible for arranging manpower support for ESC organizations to accomplish their stated mission.

2.1.3. The use of contractor personnel will not offset any reductions in authorized organic manpower for personnel who perform inherently Governmental functions.

2.1.4. Do not use manpower support contracts to bypass or undermine personnel ceilings, pay limitations, or competitive employment procedures.

2.1.5. Contracted Support Management (ESC/XPK) organization is the only authorized support contracting activity for ESC manpower support contracts. The Executive Director (ESC/CD) must approve exceptions to the above.

2.1.6. Functionals are responsible for organizing, training and equipping their resources and for assessing resource requirements assigned to matrix organizations. They ensure (1) the measurement and validation of workload assessment models and results, (2) the training and career development of their people, and (3) the assignment of qualified personnel in accordance with ESC corporate principles and objectives. They recommend whether a position for which they are responsible for can be filled by an organic or a contracted resource. Functionals must establish and maintain a dialogue with program directors and their system program office (SPO) functional chiefs. This is done to address and validate manpower requirements.

2.1.7. Program directors project their resource requirements consistent with direction and funding. Functionals are responsible for validating requirements.

2.1.8. Functionals and program directors must ensure that inherently Governmental work is performed with organic resources. Furthermore, functionals and program directors ensure the maintenance of a core level of experience that provides for "smart buyer" capability within the Government work force to (1) develop the internal processes necessary to execute the acquiring of supplies and services, (2) define requirements, (3) decide preferred solutions, (4) manage the expenditure of Government funds, and (5) accept or reject the final product and services.

3. References, Abbreviations, and Acronyms. See Atch 1.

4. Terms Explained.

4.1. Advisory and Assistance Services (A&AS). Those services acquired by contract from non-Governmental sources to (1) support or improve organization policy developments, decision-making, and management and administration; or (2) improve the effectiveness of management processes or procedures (except services excluded or exempted by regulations from the definition of advisory or assistance services). A&AS includes SETA and Federally Funded Research and Development Centers (FFRDC).

4.2. A&AS Management Plan. The document maintained at the requiring activity or at a level of organization specified by the DoD Component Director for A&AS support that identifies projected and ongoing A&AS actions. For ESC, the Contracted Support Management office (ESC/XPK) maintains the A&AS Management Plan.

4.3. Allocation. The level of support assigned to a project (or projects) in man-years for a particular user. ESC/XPK validates allocations and issues periodic allocation reports.

4.4. Best Value: Best value describes what is important to your program. Usually these criteria are similar to those of Source Selection but the process is not a Source Selection. The same three factors (as a minimum) are considered. They are (1) technical criteria, (2) cost/price, and (3) past performance.

4.5. Blanket Purchase Agreement (BPA). A simplified method of filling anticipated repetitive needs for supplies or services by establishing charge accounts with qualified sources of supply.

4.6 Business Case Analysis (BCA). Prior to the exercise of an ITSP task order option period, a BCA is accomplished to critically review the A&AS work performed under. The BCA is briefed to ESC/CD for approval. Areas addressed in the BCA include program office manpower size, SETA use in past and future fiscal years, basis of existing task order (i.e., was there competition, GSA discounts, socio-economic goals, changes to the original order, etc) and future plans for the task order.

4.67. Ceiling. A man-year limitation placed on A&AS support to DOD. This ceiling is imposed by the Director, Defense Research and Engineering (DDR&E) and is further allocated to this Center by the Assistant Secretary of the Air Force (Acquisition).

4.78. Determination/Decision Document (DDD). SAF/AQX A&AS Interim Policy Letter dated 19 Jul 96 and amended 26 Aug 96 and 12 Mar 97, requires Air Force users of A&AS to query various organizations and other agencies as to the availability of organic resources to meet their requirements before they contract for this support. The results of these activities are documented in a DDD and signed at the appropriate levels.

4.89. Employer-Employee Relationship. A personal services contract occurs when contractor personnel are subject to the relatively continuous supervision and control of a Government employee (military or civilian). Virtually all support services acquired by ESC are non-personal in nature/makeup.

4.910. Federal Supply Schedule (FSS). Directed and managed by the General Services Administration (GSA), it provides Federal agencies with a simplified process for obtaining commonly used supplies and services at prices associated with volume buying. Indefinite delivery contracts are established with commercial firms to provide supplies and services at stated prices for given periods of time. Ordering offices issue delivery orders directly to schedule contractors (or through BPAs held by schedule contractors).

4.1011. Functionals. Functional directors who serve on the ESC RUB.

4.1112. Functional Area Chief (FAC). The Government representative who is responsible for a functional area in which a contractor provides the services. In two-letter program offices, the FAC is the functional chief who is responsible for the relevant resource management. In two-letter non-program offices, the FAC is the director or the assistant director (~~See AFMC FAR SUP 5337.91~~ AFI 63-124).

4.1213. Functional Area Evaluator (FAE). The Government representative who is responsible for monitoring, evaluating and reporting contractor performance on a specific contract requirement (i.e. task,

subtask or any grouping of these). The FAC appoints the FAE (~~See AFMC FAR SUP 5337.91~~ AFI 63-124).

~~4.13~~14. Inherently Governmental Functions. Functions that warrant performance by Government employees because they are so intimately related to the public interest. These functions apply to activities that require the use of discretion in applying Government authority or the use of value judgments in making decisions for the Government. An inherently Governmental function involves policy determination and the direction and control of federal employees. In some cases, these functions involve the activities and property of private citizens (See Atch 3).

~~4.14~~15. Market Research. Involves obtaining information specific to the item being acquired. Use the results of market research to determine if sources capable of satisfying the agency's requirements exist.

~~4.15~~16. Non-ceiling. Any non-DOD funded projects that are not bound by a ceiling. FMS funded projects are not ceiling constrained.

~~4.16~~17. Non-personal Services Contract. A contract in which the personnel rendering the services are not subject to supervision and control (either by the contract's terms or by the manner of its administration) as usually prevails in relationships between the Government and its employees (See Atch 4).

~~4.17~~18. Organizational Conflict of Interest (OCI). A situation that occurs when (1) a person is unable (or potentially unable) to render impartial assistance or advice to the Government, (2) the person's objectivity in performing the contract work is (or might be) impaired, or (3) a person has an unfair competitive advantage (See FAR 9.5).

~~4.18~~19. Personal Services Contract. FAR Part 37 defines a personal services contract as a contract that, by its express terms or as administered, gives contractor personnel the appearance of being Government employees. The contract is characterized by the employer-employee relationship it creates between the Government and the contractor's personnel. Unless specifically authorized by statute, obtaining personal services by contract is illegal (See Atch 4).

~~4.19~~20. Procurement Integrity. The policies and procedures outlined in 41 U.S.C. Sec. 423 and FAR 3.104 concerning the avoidance of improper business practices and personal conflicts of interest.

~~4.20~~21. Service Contracts. A contract that directly engages the time and effort of a contractor whose primary purpose is to perform an identifiable task rather than furnish an item of supply. A service contract may be either non-personal or personal (See FAR 37).

~~4.21~~22. Standards of Conduct. The ethical principles governing the activity of Government employees. These principles ensure that an individual's private interests and official duties do not conflict.

~~4.22~~23. Statement of Objective (SOO). A Government prepared document that states the overall project objectives.

~~4.23~~24. Support Contracts. Contract used by SPO and functionals when organic resources are not available at ESC in the required skills or number. Such contracts provide systems acquisition support normally performed by organic SPO resources. Support contracts typically require a contractor's time and effort in accomplishing a needed task or function for a level of work extending over a specified

timeframe. They also involve contracts that include delivery of end products (e.g., reports, other data, or samples), when said products are incidental to, but not the object of, the task. Orders placed against the ITSP BPAs (under the auspices of the GSA FSS Group 70 Schedule contracts) are an example of these.

~~4.24~~²⁵. ~~System Support~~ Engineering and Technical Assistance (SETA). Functional manpower support such as engineering, manufacturing, financial management, program management support, acquisition logistics and test acquired from various ESC contract vehicles. These services are acquired by or for a program office to increase the design performance capabilities of existing, new or emerging systems, or where they are integral to the logistics support and maintenance of a system or major component and/or end item of equipment essential to the operation of the system before final Government acceptance of a complete hardware system. Examples of SETA support include, but are not limited to, independent verification and validation, logistics support analysis, acquisition logistics support, test and evaluation and program management support.

5. Responsibilities.

5.1. ESC Directors, Program Directors, or Deputy Program Directors.

5.1.1. Determine and justify all requirements for ITSP support on projects under their jurisdiction.

5.1.2. Program the required funding and prepare the needed documentation for placing orders and funds on contract.

5.1.3. As FACs, the following responsibilities apply:

5.1.3.1 Select an FAE for each ITSP project that provides services to your organization. Notify the ~~ESC/XPK~~ ITSP Procuring Contracting Officer (PCO), as well as your own program's ordering PCO, of the selection, or of any changes in FAE status via the appointment and designation letters at Atch 5.

5.1.3.2. Ensure each FAE (1) understands the technical instructions required for the services; and (2) has the knowledge and resources to determine acceptability of the contractor's performance. Ensure FAE contacts ESC/XPK for required FAE Training.

5.1.3.3. Ensure that the annual ITSP requirements (1) are reflected in the ESC/XPM and ESC/XPK data bases; and (2) are current and essential.

5.1.3.4. Conduct a semi-annual review of performance and summarize the contractor's performance annually.

5.2. Functional Area Evaluators (FAE).

5.2.1. Coordinate all outgoing correspondence pertaining to ITSP support with cognizant contracting office.

5.2.2. Assist in the preparation of SOOs (See Atch 2) and ensure they are kept current.

5.2.3. Prepare a project specific surveillance plan as required by ~~AFMC FAR Supplement 5337.91~~ ~~AFI 63-124~~ (this document may serve as the overall surveillance plan).

5.2.4. Maintain a surveillance log that tracks the project specific surveillance plan activities and include other pertinent observations as appropriate.

5.2.5. Maintain a surveillance folder for one (1) year after the project completion date. This folder must contain the following: a copy of this instruction, FAE appointment and designation letter, the project specific surveillance plan and surveillance log, ~~and the~~ FAE Training certificate, ~~and the monthly Funds and Man-hour Expenditure Report.~~ For assessing performance, the folder must also contain the semi-annual contractor evaluations.

5.2.6. Assist in acquiring the Government property (if any) needed to comply with the approved SOO.

5.2.7. Ensure that installation support Memorandums of Agreement (MOA) are negotiated with the appropriate overseas (OCONUS) Government installation authorities (MOAs fully outline the ITSP support requirements).

5.2.8. Provide the ITSP contractor with the pertinent information required by the project tasking.

5.2.9. Monitor project performance and provide a semi-annual contractor evaluation to the FAC, when requested.

5.2.10. Evaluate costs, as reported in monthly cost report, to determine the consistency with the technical progress and performance to date. Notify ITSP contractor if any inconsistencies are found.

5.2.11. Report late data deliveries to the ITSP PCO within 30 days; the PCO can then take appropriate corrective action.

5.3. Contracted Support Management (ESC/XPK).

5.3.1. Function as the office of primary responsibility on ITSP matters. Evaluate, award and administer the BPAs. Make necessary changes, as appropriate. Reviews BPAs annually.

5.3.2. Update FAEs monthly on (1) SETA support allocation, and (2) ITSP contract obligations for all projects.

5.3.3. Compile, analyze and publish an annual customer satisfaction report.

5.3.4. Develop and approve the SETA baseline program and any adjustments to the allocation of support throughout the year.

5.3.5. Maintain the ITSP web site.

5.4. The ITSP PCO (ESC/XPK).

5.4.1. Designate, in writing, the FAC's selections of FAEs. Specify the limits of the FAE's authority; and maintain a listing of all FAEs by project, office symbol and training status.

5.4.2. Ensure FAEs understand all applicable contract terms.

5.4.3. Responsible for overall ITSP management.

6. DOD Budget Limitations. DOD imposes a yearly limit on the resources to acquire A&AS support. This policy came about in response to Congressional concerns regarding the total value of DOD support contractor costs. DDR&E establishes the annual budget limitation. SAF/AQ allocates an annual budget (portion of the ceiling) to AFMC and ESC. This provides a balance between mission, priority, and urgency considerations. **Note:** Unlimited A&AS support is not available. Once the RUB allocates the ceiling, increased support to one program is achieved at the expense of another -- a major factor influencing the policies and procedures detailed in this document.

7. ITSP Program. Only assign tasks when the role is appropriate. **ITSP will not be used if the Government can do the job.** The approved SOO must clearly define and document a project role, and it must define relationships with other contractors.

7.1. Ordering Guidance. ITSP ordering procedures are taken from aspects of the GSA FSS ordering procedures for services; SAF/AQC Contracting Policy Memo 98-C-07, dated 01 May 98, "Use of Blanket Purchase Agreements (BPA) With Federal Supply Schedules (FSS)," as well as ESC policy addendum.

7.2. Ordering Procedures. FAR 8.402 addresses procedures for ordering services priced on GSA schedules at (loaded) hourly rates. These special ordering procedures take precedence over those "standard" procedures in FAR 8.404.

7.2.1. Decentralized ordering is authorized for ESC (ITSP-user) programs in accordance with Air Force FAR SUP 5316.505-90. ESC/XPK administers the ITSP program centrally, but authorizes its individual users to prepare orders locally for central ITSP PCO execution. For example, ESC-Hanscom user offices complete their solicitation, evaluation and selection process and then prepare an order/orders for award. They are forwarded to the ESC/XPK ITSP Contracting Officer for review and signature. The order is then returned to the user for award distribution. Each GSU will follow the same procedure by establishing its own clone of ESC/XPK, or simply identify one internal contracting office to process and award all of their user ITSP orders. **IT IS IMPERATIVE THAT ESC/XPK BE A DISTRIBUTION RECIPIENT FOR EACH ITSP ORDER/MODIFICATION SUPPORTING ANY CENTER USER** so that the data will be available for centralized management and administration purposes.

7.2.2. Decentralized ordering (with centralized execution) is authorized at all ESC-Hanscom PK SPO/Product Area Directorate (PAD) support offices, as well as at the GSU contracting offices (MSG/PK; SSG/PK; CPSG/PK; 38LS/LGC Contracting Flight). Ordering offices shall adhere to the terms and conditions of the BPA as well as those of the controlling GSA FSS Schedule contract, and prevent or identify any abuses, such as issuance of orders for services that are not within the scope of the ITSP program. Ordering offices shall follow the ITSP program policies and procedures for solicitation, evaluation, selection and award of orders, to include procedures promulgated by SAF/AQC Contracting Policy Memo 98-C-07, dated 01 May 98, "Use of Blanket Purchase Agreements (BPA) With Federal Supply Schedules (FSS)." Contracting officers initiating orders on behalf of their SPO/PAD user shall also ensure that oversight of contractor performance is maintained, and semi-annual program-support reviews are conducted with your ITSP BPA contractor/team.

7.3. Ordering Process.

7.3.1. Program Office. Identify your requirements and prepare requirements packages that include the following:

7.3.1.1. SOO. The SOO should outline, as a minimum, the work to be performed, location of work, period of performance, deliverables, applicable agreements (MOAs, host tenant agreements, Status of Forces Agreement (SOFA), etc.), evaluation criteria, any special requirements (i.e. security clearances, travel, special knowledge, etc.) and the name and phone number of the primary and alternate FAE.

7.3.1.1.1. The period of performance of initial orders awarded as Labor Hour type (with cost reimbursable support CLINs) cannot exceed a basic period of performance of 12 months. Firm Fixed Price type orders can have a longer period of performance if dictated by the length of the task completion requirement (but not to exceed the period end date of the sponsoring BPA). Requirements for continued support can be obtained by either modifying the incumbent's order with additional taskings, obligations and an extended period of performance (via Option Exercise if provided for within the order), or a new BPA solicitation and down-select process can take place for ordering the new requirements for the additional period identified.

7.3.1.2. Best Value Criteria. Identify your best value criteria and document it in a Best Value Plan. Best value criteria consists of the following (although, not all-inclusive):

7.3.1.2.1. Technical/management approach and/or capabilities.

7.3.1.2.2. Innovativeness of requirements solution proposal.

7.3.1.2.3. Support transition plan (old support to ITSP).

7.3.1.2.4. Cost/price considerations (to include rate discounts).

7.3.1.2.5. Past performance/experience in certain functional or specialized areas.

7.3.1.2.6. Ability of offeror (if requested in RFQ) to propose a requirements solution in a way which would allow the user the option of making multiple direct order awards to Lead/Prime and/or BPA teammates so that socio-economic goals are achieved.

7.3.1.2.7. Ability of offeror (if requested in RFQ) to propose a requirements solution against identified (separate and distinct) subsets of the overall requirement, so that the user has the option of making one or more order awards to one of more BPA offerors.

7.3.1.2.8. Others to be tailored according to the specific or unique needs of the user.

7.3.1.3. Market Research Source(s). Identify those sources (BPA holder/team) you will issue the RFQ to and identify the appropriate socio-economic status of each firm on the BPA team.

7.3.1.4. ~~RESERVED Identify the Functional Area. Each requirements package submitted for a control number must identify the anticipated functional support (estimated level of effort by category) to be acquired. The functional areas being utilized for ITSP support are:~~

~~—— XP: Engineering, Logistics, Configuration and Data Management Support~~
~~—— FM: Financial Analysis, Program Control and Specialized Cost Services~~
~~—— CE: Civil Engineering, Real Estate~~
~~—— IM: Information Management Services~~
~~—— IN: Intelligence & Security Information Services~~
~~—— SC: Computer, Information Technology Services~~

—— PK: Contracting

~~When the final order is submitted to ESC/XPK for review/signature, include a memo for record identifying the number of hours in each functional area.~~

7.3.1.5. Funding Document. The funding document (i.e., AF Form 36, AF Form 9, AF Form 616, MIPR, etc.) should be properly executed and certified. All funding documents should contain an A&AS Code (See Atch 8).

7.3.1.6. Determination Decision Document (DDD). ~~Prior to ordering A&AS services, you must have an approved DDD justifying the need to procure contracted support due to the unavailability of organic resources to address mission requirements.~~ ITSP ~~will have~~ has an approved “Class DDD” to cover its requirements through 31 Mar 02.

7.3.2. ESC/XPK Review. Once the above requirements package is complete, ESC-Hanscom location users forward same to ESC/XPK for review (support scope, etc.). The package will include (as a minimum) the SOO, evaluation criteria and the specific BPA Teams to be solicited by the user. See the ITSP Review Checklist at Atch 7 for additional requirements. GSU users forward same to their locally designated ESC/XPK office. For requirements to be satisfied under the Specialized Cost Services (SCS) BPAs under ITSP, the requirements package will be reviewed by ESC/FMC prior to ESC/XPK review. Once a satisfactory review is accomplished, a control number will be issued by the reviewing office for the user’s requirement so that the process can be monitored until selection and order award take place. Examples of control numbers are as follows:

Hanscom: 99-HAN-AC-0001
CPSG: 99-CPG-XY-0001
MSG: 99-MSG-YZ-0001
SSG: 99-SSG-YX-0001
38th EIW: 99-38E-ZY-0001

99 = FY of requirement
HAN (etc.) = ESC geographic location
AC (etc.) = user/program office (2-4 alphanumeric digits)
0001 = control number awarded sequentially to user

7.3.3. Prepare a Request For Quotation (RFQ).

7.3.3.1. The RFQ should indicate whether the offeror should submit a proposal for a Labor Hour order structure, or a Firm Fixed Price order structure. A Fixed Price order should be requested only if the ordering office determines that it is possible at the time of placing the order to estimate accurately the extent and/or duration of the work, and to anticipate cost with any reasonable degree of confidence. When that’s not possible, a Labor Hour quote will be requested.

7.3.3.2. The RFQ should also specify whether support is to be collocated in Government facilities or not, and if so, whether the Program Office will provide ADPE for support contractor personnel to use as part of the basic collocated “Base Support” of a phone, a desk and a chair. This information will allow the BPA offeror to determine whether to bid its on-site or off-site rates as contained in its BPA (or proposal-specific discounted rates). Program Offices who opt not to provide such ADPE as Base Support will normally be better served NOT to contract for support where the contractor requests reimbursement to cover the cost of outfitting their personnel with ADPE for use within Government work space areas,

because the users will eventually have to assume ownership of such ADPE as Government Property (paid for under certain expenditure payments under the order's invoicing procedures. This is not the proper procedure for user acquisition of ADPE.

7.3.3.3. Offeror proposals shall be based on the hourly rates in the schedule contract (or any discounted rates being provided by the offeror for the particular user requirement being bid) and shall consider the mix of labor categories and level of effort required to perform the services described in the offeror's Statement of Work (SOW). The proposal shall also include any other estimated incidental costs related to performance of the services ordered (e.g. reimbursement of travel costs at the rates provided in the Joint Travel Regulations (JTR)). A ceiling price (both in man-hours and dollars) must be established for Labor Hour orders.

7.3.3.4. The RFQ may also solicit from the offerors information on their experience and/or past performance with respect to similar tasking scope. The request shall also notify the offerors what basis (evaluation criteria) will be used for selecting the BPA Team(s) to receive the order. Best value selection criteria, including the intended use of past performance factors, shall be included in the request.

7.3.3.5. As part of the BPA offeror's proposal, users may request resumes of offeror personnel in applicable functional areas to provide insight into the qualifications for performance of proposed support. Since we are acquiring non-personal services, such resumes should be sanitized (nameless) so that qualifications are evaluated rather than individuals.

7.3.4. Issue Electronic Solicitation. Electronically transmit the RFQ to no fewer than three (3) BPA Team offerors for requirements estimated at \$500K or less; at least four (4) BPA holders if in excess of \$500K (unless you've secured an approved J&A for selection of a sole source services provider). This step occurs after users have conducted their market research via analysis of BPA holder web sites (containing team makeup, scope of services offered, labor rates, experience/past performance insight, and other factors) and/or capabilities discussions with business representatives of BPA holders to determine a group (no fewer than 3) of BPA (holder) Teams who appear to offer the best prospective value for fulfilling their requirement. When soliciting, ordering offices should explore pursuing prices below those that are already on the BPA holder's GSA schedule, or BPA itself. Ordering offices should strive to minimize the BPA teams costs associated with responding to requests for quotes for specific orders. Requests should be tailored to the minimum level necessary for adequate best value evaluation and selection for order placement. Oral presentations can supplement a written proposal if so requested by the user.

7.3.5. Conduct Best Value Down-Select. In performing evaluations, review all factors (price and non-price, which includes past performance) in making an award. Organizations shall consider small business participation as a factor in the best value selection for an order.

7.3.5.1. If necessary (in order to ensure that you can make your best value decision), discussions with offerors can take place in order to clarify aspects of a proposal that may be vague/ambiguous. Proposal change pages may be submitted by an offeror if the outcome of the clarification discussions warrants an update to the proposal submitted.

7.3.6. Review Socio-Economic Goals. As a Product Center, ESC-wide order obligations under the ITSP support services program have to accumulate, as a minimum, an amount of at least 25% direct award obligations to the Small Business (SB) community. Of that 25% threshold, there's a 5% subset goal for Small & Disadvantaged Businesses (SDB), and a 5% subset goal for Woman-Owned (WO) Businesses. Basic Small Business obligations would therefore need to be 15% or higher for overall small business

community goal attainment. **Each 2-Ltr user is responsible for achieving or exceeding the above goals individually in order to ensure Center-wide success** (unless relief is granted by ESC/XP based upon mission essential rationale).

7.3.7. Select Contractor. After responses have been evaluated against the factors (evaluation criteria) identified in the request, the order shall be placed with the BPA holder (Team) that presents the best value (based upon an integrated assessment of technical and management capabilities, cost/price, past performance, socio-economic award goal attainment, etc.) to meet the Government's needs. The ordering decision should be documented and be consistent with the established evaluation process. A memorandum containing the user's rationale for selection shall accompany the documentation leading to award of an order.

7.3.7.1. If all proposal submittals are deemed too costly by the user, you have the option of informing the offerors that the requirements solutions are unreasonable and you are revising the scope of your requirements objectives (down-scope) in the hope of receiving revised proposals from which award and ordering can be achieved.

7.3.8. Prepare Order Documentation. Once the selection process and award rationale documentation memo is complete, user ESC/PK-support offices can begin "writing" the order(s) for award, using the Contract Line Item Number (CLIN) structure and format prescribed herein and as required by the Air Force (See Para 7.3.8.3). The proposed order file(s) will then be submitted to your respective ESC/XPK-type office (depending on geographic location) for review of evaluation/selection/award rationale, accuracy of order content and central ITSP Contracting Officer signature. Signed orders will be returned to the respective user's ESC/PK-support group for initiation of the distribution process for formal award. **ESC/XPK must also be a recipient of every order/modification distributed under the ITSP program.**

7.3.8.1. Depending on previously stated user requirements and evaluation criteria for your support procurement, users have ordering options to include placing one (1) order strictly with the BPA Lead/Prime contractor, one or more orders with Teammates designated by the Lead in its proposal, or multiple orders to include the Lead and other Teammates proposed for direct awards (since they have their own GSA Schedule contracts) as identified in the BPA Team proposal. Direct ordering from teammates might be an option for several reasons, most likely of which would be to secure credit toward socio-economic obligation goal attainment when such a Teammate is an SB, an SDB, and/or a WO business. Subcontractors (those companies on a BPA Team but without their own GSA Schedule contract) cannot receive direct orders but rather must be part of the support to be provided through a direct order award to the Lead/Prime, and at the Lead labor rates.

7.3.8.2. Service CLIN Structure. A service CLIN contract structure will be used for all orders. CLINs will be associated with their respective "color of money" (e.g., Research and Development (R&D), Procurement (Proc), Operation and Maintenance (O&M) and Foreign Military Sales/NATO (FMS) fund cites). CLIN "Info-SubCLINs" will be used to correspond with each accounting classification reference number (ACRN) identified for each Section G fund citation:

R&D funds use ACRN "A" series (AA...AZ, A1-A9)

Proc funds use ACRN "B" series (BA...BZ, B1-B9)

O&M funds use ACRN "C" series (CA...CZ, C1-C9)

FMS/NATO funds use ACRN "D" series (DA...DZ, D1-D9)

7.3.8.3. Task Order CLIN (“series”) Structure by Fund Type. In order to assist the centralized Contracting Officer to easily identify funding types and efforts contemplated in an individual order, the following standardized CLIN structure has been established:

R&D Funds:

CLIN 0001 ITSP Labor (R&D funds)
CLIN 0002 ITSP Data (R&D funds)
CLIN 0003 ITSP Travel (R&D funds)
CLIN 0004 ITSP Material (R&D funds)
CLIN 0005 ITSP Other Direct Costs (ODC) (R&D funds)
CLIN 0006 ITSP Equipment Lease/Rental (R&D funds)
CLIN 0007 Reserved
CLIN 0008 Reserved
CLIN 0009 Reserved
CLIN 0010 Reserved

Procurements Funds:

CLIN 0011 ITSP Labor (Proc funds)
CLIN 0012 ITSP Data (Proc funds)
CLIN 0013 ITSP Travel (Proc funds)
CLIN 0014 ITSP Material (Proc funds)
CLIN 0015 ITSP Other Direct Costs (ODC) (Proc funds)
CLIN 0016 ITSP Equipment Lease/Rental (Proc funds)
CLIN 0017 Reserved
CLIN 0018 Reserved
CLIN 0019 Reserved
CLIN 0020 Reserved

O&M Funds:

CLIN 0021 ITSP Labor (O&M funds)
CLIN 0022 ITSP Data (O&M funds)
CLIN 0023 ITSP Travel (O&M funds)
CLIN 0024 ITSP Material (O&M funds)
CLIN 0025 ITSP Other Direct Costs (ODC) (O&M funds)
CLIN 0026 ITSP Equipment Lease/Rental (O&M funds)
CLIN 0027 Reserved
CLIN 0028 Reserved
CLIN 0029 Reserved
CLIN 0030 Reserved

FMS/NATO Funds:

CLIN 0031 ITSP Labor (FMS/NATO funds)
CLIN 0032 ITSP Data (FMS/NATO funds)
CLIN 0033 ITSP Travel (FMS/NATO funds)
CLIN 0034 ITSP Material (FMS/NATO funds)
CLIN 0035 ITSP Other Direct Costs (ODC)(FMS/NATO funds)
CLIN 0036 ITSP Equipment Lease/Rental (FMS/NATO funds)
CLIN 0037 Reserved
CLIN 0038 Reserved
CLIN 0039 Reserved

CLIN 0040 Reserved

Working Capital Funds (MSG and others as applicable):

Either use the same CLIN structure as above (with the series running from 0041 through 0050) or determine whether such funds are one, two or three year funds and associate with the appropriate series: O&M (one year), R&D (two years) or Procurement (three years).

7.3.8.4. Order Cover Page (DD Form 1155 or Acceptable Format).

7.3.8.4.1. Block #1 will contain the awardee's GSA Schedule No. (e.g. GS-36F-5010G). Block #2 will contain Order Number (e.g. F19628-99-F-8XYZ). We are using the 8000 series for orders placed against BPAs under the GSA FSS in order to track data under the DD Form 350 inputs. In addition, with regard to the DD350, if Code B13A=6, then D1 (Type of Business) must also be filled in; if B13A=6, then D6 (Women-Owned Business) must also be filled in.

7.3.8.4.2. Block #3 is the effective date (or Mailing Date) of the order.

7.3.8.4.3. Block #22: After "REFERENCE YOUR" text, "asterisk" the awardee's BPA No. (e.g. F19628-99-A-0001) in that line. **Order Numbers from the 8000 series will be assigned by CONDAPS (the same source which issues new contract numbers) or via manual logs at GSUs without CONDAPS.** Anytime a user requests a PIIN for an "F" action (in our case, an ITSP BPA order number), the user will be asked whether it is an ITSP action (vice a direct order against a GSA Schedule, for example), and if so, assigns the next available PIIN in the F-8000 series. **For purposes of ITSP "F" type actions only, the 8000-8999 range will be reserved in the following manner** (subject to later revision, if necessary):

F-8000 through F-8499: for use by ESC at Hanscom AFB

F-8500 through F-8599: for use by CPSG/PK at Kelly AFB

F-8600 through F-8999: Reserved (TBD)

(MSG and SSG will reserve their own 8000 series numbers for their distinct buying office code, as will 38th EIW. MSG has identified their code as being "FA8770" vice ESC-HAFB code of "F19628."

7.3.8.4.4. Effective Date of the Order may be the "Mailing Date," a future specified (prospective) start date, or a retroactive start date **only if** two (2) actions have both already been accomplished:

7.3.8.4.4.1. The selection decision for award has already been completed (to include) the written rationale for same; and

7.3.8.4.4.2. The ordering Contracting Officer has initiated a letter authorizing the awardee(s) to proceed at risk (if they so agree) pending the formal issuance of the order and its obligated funding.

7.3.8.5. Order Attachment pages will include (as a minimum) Contract Data Requirements List (CDRL) (See Atch 6), any applicable DD Form 254 (Contract Security Classification Specification), awardee's proposal or proposed SOW incorporated (to include labor category and estimated cost or price breakouts, etc.).

7.3.9 Submit to ESC/XPK for Review/Signature. Submit complete order, along with the certified funding document to ESC/XPK for review and signature by the ITSP Contracting Officer. Include a

memo for record identifying the number of hours in each functional area. The functional areas being utilized for ITSP support are:

XP: Engineering, Logistics, Configuration and Data Management Support
FM: Financial Analysis, Program Control and Specialized Cost Services
CE: Civil Engineering, Real Estate
IM: Information Management Services
IN: Intelligence & Security Information Services
SC: Computer, Information Technology Services
PK: Contracting

See the ITSP Review Checklist at Atch 7 for additional requirements. GSU ordering offices will submit their complete order to their specific contracting officer for review and approval.

7.4. Administering the ITSP Order.

7.4.1. Options. You can modify an existent order for additional or continuing support, rather than re-compete (through the BPA down-select process) for that additional support if your original order's RFQ had requested the contractor to also propose support for one or more option years (but not to extend beyond 31 Mar 02). Such option years would also have to be pre-priced for purposes of future exercise considerations.

7.4.1.1. If options are to be considered for the possible extension of incumbent support beyond the basic period of performance identified in the order, your order has to also include a date (prior to basic award end date) by which the option has to be exercised. In addition, as long as you evaluate the option period(s) as part of the best value decision for the initial order, there would be no requirement to perform another best value decision before exercising the option. Just ensure that there is a continuing requirement, that funds are available, that past performance has been satisfactory, ~~and~~ that prices proposed for the option period are fair and reasonable and a BCA has been approved by ESC/CD, before exercising.

7.4.2.2. Should your ITSP order not contain options for (exercising) continued performance, you will have to conduct a new solicitation and down-select procedure for award of follow-on support no later than the end date of your current order. For follow-on orders, the evaluation criteria for picking the best source SHOULD INCLUDE the costs and schedule implications of disruption should there be a break in continuity of support. Where warranted, those criteria may also further substantiate a decision to keep the incumbent team in place, should that result be your best value decision.

7.4.2. All proposed modifications to ITSP orders which increase the quantity of labor hours or increase the estimated costs for labor must be reviewed by ESC/XPK prior to award (at the GSUs, review will be completed by the ITSP centralized management office). The file submitted for review must include rationale for such changes and a determination regarding whether the change is considered to be within-scope of the original order. Actions found not to be within-scope must either be competed or supported by a Justification and Approval (J&A) in accordance with FAR Part 6. In the event that the SPO and ESC/XPK do not agree that a change is in-scope, the file will be submitted to ESC/JA for review and the matter will be elevated to the competition advocate, ESC/PK, for approval. The purpose of this policy is not to preclude any adjustments to

existing orders but rather to ensure that the existing orders do not grow unreasonably without the benefit of competition.

7.4.23. Collocation. The following administrative procedures apply to the collocation of ITSP support personnel with the US Government (at MITRE or at Hanscom):

7.4.33.1. Limit administrative support to the ITSP contractor to that service which can be efficiently and economically provided from a single source. Normally, administrative support is limited to items such as space, heat, light, and security service. This support is subject to review as a part of contract negotiations; however, it is not subject to negotiation or expansion by the program offices being assisted.

7.4.3.2. The Program Offices located in MITRE facilities request the requisite office space needed to collocate Government support contractor personnel with the program office at The MITRE Corporation. The MITRE administrative support to Government support contractors will not exceed the level of support provided to collocated Government personnel.

7.4.53.3. The Visual Information Service Center (66SPTG/SC) provides graphics support to Government personnel only.

7.4.63.4. The Defense Printing Service provides reproduction support to Government personnel through the Publications Liaison Office (66MSS/IMPR). Government personnel must use USAF copiers; ITSP contractor personnel collocated in either MITRE or Hanscom facilities may use available Government copiers.

7.5. Communications Support. ITSP contractor personnel who are assigned office space in Air Force facilities are provided telecommunications support as follows:

7.5.1. ITSP Contractor Personnel in MITRE Facilities. MITRE provides normal voice communications (including telephone instruments, and access to tie lines, local service, and long-distance service). MITRE is solely responsible for installing telephone equipment in MITRE facilities. The Government Program Office (GPO) orders and pays for nonstandard equipment such as speaker phones, answering machines, and dedicated high quality circuits. The GPO must submit AF Form 3215, Communications-Computer Systems Requirements Document, to the Communications-Computer Systems Director (66SPTG/SC) when ordering nonstandard equipment and inform MITRE, in writing, of any GPO ordered circuits scheduled for installation on MITRE premises. ITSP contractor personnel must follow the MITRE established policies regarding placement and reimbursement of long-distance telephone calls.

7.5.2. ITSP Contractor Personnel in Government Facilities. The Air Force provides normal voice communications service (including telephone instruments, and access to tie lines, local service, and long-distance service). The Air Force is responsible for installing telephone equipment in Air Force facilities. ITSP contractor personnel order and pay for nonstandard equipment such as speaker phones, answering machines, and dedicated high quality circuits. The GPO must inform the Telecommunications Office (66SPTG/SCXM), in writing, of any contractor-ordered circuits scheduled for installation on Air Force premises. ITSP contractor personnel must follow Air Force established policies regarding the placement and reimbursement of long-distance telephone calls.

7.6. Acquiring and Disposing of Government-Owned Property for ITSP Use.

7.6.1. Acquiring Property. Property specifically acquired by the Air Force and other DOD project offices are furnished to the ITSP contractor on a DD Form 1149, Requisition and Invoice/Shipping Document. This property is (1) transferred to the contractor; and (2) the contractor is made accountable. If the project office is to retain control of the property, use a DD Form 1149 to annotate any limitations to the property's disposition. This enables Base Supply to "pick up" the property on the project office sub-base account. At the time of requisition, furnish copies of all requisitioning documents to the contractor property office.

7.6.2. Disposing of Contractor Acquired Property. As per the DD Form 1148, dispose of all property that (1) the project office has provided; and (2) has a limited disposition. Dispose of the property through ESC/XPK (See the issuing source for disposition instructions).

7.6.3. Government surplus property may be reassigned from one project office to another upon the ITSP contractor recommendation and ESC/XPK approval (This precludes the unnecessary procurement of similar new property).

7.6.4. For disposition instructions on declared surplus Government property, contact the Government Property Clearance Officer within ESC/XPK (781-981-4359).

7.6.5. Capitalization Requirements. The ITSP contractor shall provide their employees sufficient microcomputer equipment to support orders. The ITSP contractor shall be able to support the automatic transmission of unclassified data only to the requiring Program Office by modem if so requested. Any computers connected to, or transmits to (connected or via magnetic media) the Government shall be properly protected from computer viruses. The ITSP contractor shall be capable of supporting the software packages utilized by ESC for the indicated processors. Specific software packages utilized within an ordering office shall be stated in the order PWS if it is other than Microsoft Office Professional or Microsoft Project.

8. Criteria for Allocating ITSP Support.

8.1. The ESC RUB oversees the allocation of SETA manpower resources. This council is chaired by the ESC Commander.

8.2. RUB manpower allocation is a requirements based process that starts with a bottoms-up assessment of the SPO-identified requirements-by function and by program. ESC/CC makes the final decision on all manpower allocations. Functionals are assigned organic positions and contracted support in man-years based on validated estimates of functional requirements. The SPO requirement for each functional area becomes the basis for allocation. Functionals, in turn, allocate the resources (both organic and contracted support) to the customers. Note: Allocation is based on a fair share of the functional director-validated requirements and ESC/CC's established priorities.

8.3. Before the start of a fiscal year, customers identify their combined SETA needs for the next five fiscal years by program and by functional discipline. The SPO provides this information to ESC/XPK. It is used as the basis for (1) allocating available SETA resources for the year, and (2) planning the contracted support under new solicitations.

8.4. Support contracts provide functional support to our customers when it is not readily available from organic resources. In order to be cognizant of ESC's total support contract resource usage, customers must inform ESC/XPK of the allocation used.

8.5. SPOs have the opportunity to acquire their fair share of SETA resources based upon their proportion of the total ESC manpower requirements. If a SPO does not use all of its allocated ceiling, the residual is offered to other SPOs at a level that does not exceed their validated manpower requirements.

9. Procedures for Allocating SETA Support.

9.1. Formulating a New Fiscal Year Program. The baseline ITSP program for each ensuing fiscal year begins in the second quarter (Jan/Feb) and concludes in the fourth quarter (Aug/Sep) of the preceding fiscal year. Formulating this program involves three phases. Although the phases can vary as circumstances dictate, they are generally structured as follows:

9.1.1. Requirements Collection Phase. ESC/XPK initiates this phase with a data call early in the second quarter of the preceding fiscal year for SETA support that covers the next 5 years of the proposed project. The FAE records data collected for each proposed project on an ESC Form 1303 (Project Summary Form).

9.1.2. Ceiling Definition Phase. This phase begins with the compiling and collating of every ESC Form 1303 collected on a project-by-project basis during the requirements collection phase. The total SETA support requirement estimates are then analyzed and summarized, resulting in a projected SETA ceiling for the next fiscal year. The analysis includes an evaluation of the proposed ceiling projected against current and past ceilings, and it details what could happen if disapproved. The results of the aforementioned analysis and SETA ceiling recommendation are made a part of formal presentations to SAF/AQ during the May to June timeframe. At this session, the most recent SETA/ITSP performance evaluations, and appropriate special interest items, are also addressed.

9.1.3. Baseline Allocation Phase. This phase occurs from June to August of the preceding fiscal year, and it establishes the ITSP baseline program to be executed at ESC during the upcoming fiscal year. This is accomplished through (1) the ESC resource allocation process, and (2) the RUB; and it culminates in a SETA support allocation in man-years for each ESC two-letter directorate. The RUB typically convenes in the fourth quarter (Aug/Sep) of the preceding fiscal year.

GLOSSARY OF REFERENCES, ABBREVIATIONS & ACRONYMS

1. References for Support Contracts:

Office of Federal Procurement and Policy (OFPP) Policy Letters

Memo	Govt-wide Guidance on Contract Administration	15 Mar 91
91-2	Service Contracting	9 Apr 91
92-5	Past Performance Information	30 Dec 92
93-1	Management Oversight of Service Contracting (Reissued)	18 May 94

Federal Acquisition Regulation (FAR)

(Also see DFAR, AFFAR and AFMCFAR Supplements)

3.104	Procurement Integrity	
7.501	Inherently Government Functions	
8.402& 8.404	Federal Supply Schedules	
9.5	Organizational and Consultant Conflicts of Interest	
13.303	Blanket Purchase Agreements	
37.1	Service Contracts – General	
37.112	Government Use of Private Sector Temporaries and 5 CFR Part 300	
37.2	Advisory and Assistance Services	
237.2 (DFAR)	Master Agreements	
5307.105(B) (AFAC 92-23)	Control and Oversight Procedures for Decentralized Ordering by Contracting Offices	
5337.90 (AFFAR)	Service Contracts for an End Product	

ATCH 1

GLOSSARY OF REFERENCES, ABBREVIATIONS & ACRONYMS (cont)

DOD Directives

4205.2	Acquiring and Managing Contracted Advisory and Assistance Services (CAAS)	10 Feb 92
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Air Force Guidance

SAF/AQX	Air Force Advisory and Assistance Services (A&AS) Interim Policy Letter	19 Jul 96 (As Amended)
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<u>AFI 63-124</u>	<u>Performance-Based Service Contracts (PBSC)</u>	<u>1 Apr 99</u> <u>(As Amended)</u>
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Air Force Materiel Command (AFMC)

AFMCR 80-3	Sustaining Engineering Requirements
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Electronic Systems Center (ESC)

Center Advisory and Assistance Services (A&AS) Management Plan

2. Abbreviations and Acronyms:

ACO	Administrative Contracting Officer
DDD	Determination Decision Document
DDR&E	Director, Defense Research and Engineering
DOD	Department of Defense
ESC	Electronic Systems Center
FAC	Functional Area Chief
FAE	Functional Area Evaluator
FFRDC	Federally Funded Research and Development Center
FSS	Federal Supply Schedule
GFP	Government Furnished Property
GPO	Government Program Office
GSA	General Services Administration
IPT	Integrated Product Team
MOA	Memorandum of Agreement
MYR	Man-year
PAD	Product Area Directorate
PCO	Procuring Contracting Officer
RUB	Resource Utilization Board
SAF/AQ	Secretary of the Air Force for Acquisition
SOO	Statement of Objectives
SPO	Systems Program Office
USAF	United States Air Force

SAMPLE STATEMENT OF OBJECTIVES (SOO)

The SOO should outline, as a minimum, the following:

1. Describe the general program objective.
2. Describe the type of work to be performed. For example:

Acquisition Support: ESC/XX requires experienced and qualified acquisition support to develop, acquire, and deploy security systems to meet the program office mission. Acquisition support is required in several functional areas, e.g., financial management, configuration control, data management, scheduling, etc.

Test Support: ESC/XX requires experienced and qualified test support to: conduct test and turnover; manage test site activities; and participate in system certification activities. Personnel must have experience working with AFOTEC and defining developmental versus operational testing objectives.

3. List locations where the work will be performed.
4. State the period of performance.
5. List any data deliverables you will be ordering. DI-FNCL-80331/T (Funds and Man-hours Expenditure Report) is a mandatory deliverable and will be included on every ITSP order (CDRL No. A001). The format for this CDRL item is contained on the HERBB web site under the ITSP link <http://herbb.hanscom.af.mil>.
6. Describe any special requirements, i.e., security clearances, travel, special knowledge, etc.
7. List any applicable agreements (Memorandum of Agreement [MOA], host tenant agreement, Status of Forces Agreement [SOFA]).
8. List evaluation criteria.

ATCH 2

INHERENTLY GOVERNMENTAL FUNCTIONS

Below is a list of functions considered to be inherently Governmental. This list is from Appendix A of the Office of Federal Procurement Policy (OFPP) Policy Letter 92-1, but is not all inclusive.

1. Determining agency policy such as the content and application of regulations.
2. Determining federal program priorities or budget requests.
3. Directing and controlling federal employees.
4. Selecting or rejecting individuals for federal employment.
5. Approving position descriptions and performance standards for federal employees.
6. Approving of agency responses to Freedom of Information Act (FOIA) requests.
7. Determining budget policy.
8. With respect to prime contracts, perform the following in federal procurement activities:
 - a. Determine what supplies or services the Government needs to acquire. Note: an agency may give contractors authority to acquire supplies at prices within specified ranges and subject to other reasonable conditions deemed appropriate by the agency.
 - b. Participate as a voting member on any source selection boards.
 - c. Approve contractual documents (including those defining requirements, incentive plans, and evaluation criteria).
 - d. Award contracts.
 - e. Administer contracts (to include ordering changes in contract performance or contract quantities, taking action based on evaluations of contractor performance, and accepting or rejecting contractor products or services).
 - f. Terminate contracts.
 - g. Determine whether contract costs are reasonable, allocable, and allowable.

ATCH 3

PERSONAL/NON-PERSONAL SERVICES

1. Personal services are characterized by the appearance of an employer-employee relationship between Government and contractor personnel. Such a relationship is prohibited except when the Secretary of the Air Force has granted specific approval. In non-personal services the supervision and control inherent in an employer/employee relationship does not exist. We hire a contractor, specify the job in a statement of work or task order, and limit our reviews and approvals to the work products, not individual performance of contractor personnel.

2. If possible, arrange office space in such a way as to clearly identify a contractor's work area. For example, provide a contractor with a separate office space or work area--including those within an IPT location. This will help preclude any appearance of a personal service relationship between Government and contractor employees. These work areas should be clearly marked as being occupied by contractor team personnel. Ensure all contractor personnel wear badges clearly identifying them as contractors. Contractor identification should also extend to E-mail accounts. E-mail should be structured to indicate that an individual is a contractor employee.

3. The following "do's and don'ts" have been developed to help maintain a proper relationship with contractor employees:

a. **Do:**

(1) Make sure contractor team members are identified in all working situations.

(2) Clearly describe contract taskings.

(3) Maintain contact with on-site contractor employees in order to conduct surveillance and ascertain progress or delivery status. In an IPT environment, closer working relationships are needed; care must be taken to ensure only the contractor's task leader undertakes the tasking of individual contractor personnel.

b. **Don't:**

(1) Become so involved as a Government official in the operations and policies of the contractor that your judgment alone forms the basis for contractor actions such as:

(a) selecting or recruiting contractor employees;

(b) directing, scheduling, or critiquing individual contractor tasks on a continuous basis;

(c) supervising contractor employees;

(d) rating individual contractor employee performance;

ATCH 4

PERSONAL/NON-PERSONAL SERVICES (cont)

(e) hiring or firing individual contractor employees; and

(f) determining who should perform contract tasks or how they should be done.

- (2) Use Government and contractor personnel interchangeably.
- (3) Intervene in the contractor's chain of command.
- (4) Permit the contractor to perform inherently Governmental functions.

MEMORANDUM FOR: ESC/XPB

FROM: ESC/XXX

**SUBJECT: Functional Area Evaluator (FAE) Appointment(s), GSA Schedule No:
TBD, Order No: TBD, BPA No: TBD, With XYZ CORP**

1. The following individual(s) are appointed as FAE for the subject contract requirement:

Name	Organization	Phone No.	Requirement
JANE DOE	ESC/XXX	377-6059	Primary
JOSEPH DOE	ESC/XXX	377-6059	Alternate

2. Each of the individuals listed above has been notified of his/her selection as an FAE for the requirement(s) shown above and has been advised that he/she will be required to develop a surveillance plan for monitoring contractor performance.

3. Problems with the performance of any of the individuals listed above should be brought promptly to the attention of the undersigned. I can be reached at 377-XXXX

JACK DOE
Functional Area Chief
ESC/XXX

ATCH 5

**MEMORANDUM FOR: JOHN DOE (Primary FAE)
JANE DOE (Alternate FAE)**

FROM: ESC/XPK

**SUBJECT: Functional Area Evaluator (FAE); Designation for GSA Schedule No: TBD, Order
No: TBD, BPA No: TBD, With XYZ CORP**

1. You have been designated as the FAE for the contract requirement(s) listed above. This letter delegates specific responsibilities to you as the on-site representative for the PCO.
2. To effectively accomplish your duties as an FAE, you should become familiar with ~~AFMC-FAR Supplement 5337~~ AFI 63-124 and the contract listed above. You should also be aware of the technical requirements of all or any portion of the contract(s) for which you are responsible.
3. The following is a brief summary of your responsibilities as an FAE:
 - a. Develop a project specific surveillance plan. This plan is the most important part of the process and defines the methodology and procedures for monitoring the contractor's performance. The plan should be developed in cooperation with the ~~functional~~ Functional area ~~Area~~ chief ~~Chief (FAC)~~, who should review the plan and indicate concurrence with the plan prior to its submission to the PCO.
 - b. Develop and maintain a surveillance log. The surveillance plan establishes the frequency of surveillance of contractor activities and the methods for accomplishing this surveillance. A record of surveillance activities is maintained in a surveillance log. AF Form 370, Contract Performance Evaluation Report; AF Form 372, Contract Monitoring and Surveillance Report; or other appropriate surveillance reports/forms may be used for this purpose. The surveillance log should be completed quarterly.
 - c. Notify the PCO of any significant problems you are unable to resolve. Don't wait until the schedule or program is impacted; let the PCO know about the problem as soon as you realize that the contractor is not being responsive. Keep good records.
 - d. Do not authorize any changes to the contract. Only a contracting officer can bind the Government and direct the contractor to do additional work.
 - e. Submit surveillance logs to the FAC at the time intervals specified in the surveillance plan. Remember, in the event of dispute or litigation, the entries in the surveillance logs will be important in determining the choice of remedial contractual action, if such action is required.
4. If for any reason you become unable to perform your duties as outlined in the surveillance plan or have any questions about this designation or your responsibilities as an FAE, please advise the undersigned at ESC/XPK, X3-8859 immediately.

DOROTHY A. FEBBI
Contracting Officer
Contracted Support Management

Surveillance Plan

General:

This Surveillance Plan is developed in accordance with ~~AFMC FAR Supplement 5337.91~~ AFI 63-124 to establish the procedures for monitoring, reporting, and evaluating the performance of XYZ CORP, under GSA Schedule No. TBD, Order No. TBD and BPA No. TBD. Contractor requirements, level of performance evaluation, frequency and method of inspection, review responsibilities and reporting requirements are delineated in subsequent paragraphs.

1. Contract Requirements:

- a. XYZ CORP is tasked to provide (list type of) support.
- b. Contract Data Requirements List (CDRL) requirements include DI-FINCL-80331/T.

2. Level of Performance Evaluation

The contractor will be evaluated in the following areas: Technical Performance, Schedule/Timeliness of Deliveries, Contractor Resource Control and Performance by Functional Area.

a. Technical Performance: The contractor will be evaluated as to the quality of the output of his work. The contractor's personnel should be technically competent in the tasks identified in the statement of work, contract job descriptions. Included in the technical performance are the contractor's contribution in meetings/reviews, the quality of the contractor's technical reports, contractor's productivity and the overall quality of technical support provided. Technical performance will be evaluated and considered acceptable when reports submitted are current, accurate and complete upon initial submission, work effort is accurate, timely and complete and other indicators as identified during the period of performance of this task order.

b. Schedule/Timeliness of Deliveries: The contractor should be responsive to Government taskings and submit his monthly reports, technical reports and trip reports in a timely manner. Reports will be considered timely when they are submitted in accordance with the schedule established by the Task Leader and FAE and in accordance with the CDRLs associated with this task order.

c. Contractor Resource Control: The contractor is to use the hours authorized in a manner so as to provide support throughout the intended period of performance. The contractor should not exceed the material, travel or other cost reimbursable CLINs without prior contract approval. The contractor will be evaluated in the successful control of resources devoted to the task order. The Functional Area Evaluator (FAE) shall compare on a monthly basis the contractor's labor and dollar usage rate with those allocated for the effort. Any discrepancies will be brought to the attention of appropriate contractor program manager, the Functional Area Chief (FAC) and the contracting officer.

d. Performance by Functional Area. The contractor will be evaluated by specific functional areas.

3. Frequency and Method of Inspection

The ability to monitor the contractor's performance occurs on a daily basis because of collocation in the Program Office. Deficiencies noted should be brought to the attention of the FAC as soon as they occur. Method of inspection is both by observation and review of written documentation and contractor CDRL submittals.

4. Review Responsibilities

The FAE will be responsible for completing the quarterly Surveillance Log. If an independent performance evaluation will be performed by someone other than the FAE (i.e., an IPT Chief, SPO Program Manager, etc.), that name shall be provided to the FAE immediately after start of the task order. The FAE will ensure that a copy of this Surveillance Plan and copies of the Surveillance Log are provided to the appointed representative.

5. Reporting Requirements

The FAE will be responsible for maintaining the Surveillance Log. The Surveillance Log shall be filled out by the FAE on a quarterly basis. Input from the appointed representative performing an independent performance evaluation will be submitted to the FAE and included in the Surveillance Log. The Surveillance Log shall be submitted to the FAC for review semi-annually (when requested).

Attachment 1: Surveillance Log

Prepared By:

JANE DOE
Functional Area Evaluator

Reviewed By:

JACK DOE
Functional Area Chief

Approved By:

DOROTHY A. FEBBI
Contracting Officer
Contracted Support Management

Surveillance Log Instructions

The contractor will be evaluated by the FAE in the following areas:

1. Technical Performance: The contractor will be evaluated as to the quality of the output of his work. The contractor's personnel should be technically competent in the tasks identified in the statement of work and contract job descriptions. Included in technical performance are the contractor's participation in meetings/reviews, the quality of the contractor's technical reports, contractor's productivity and the overall quality of the technical support provided.

2. Schedule/Timeliness of Deliveries: The contractor should be responsive to Government tasking and submit their data deliverables (i.e., monthly reports, technical reports, trip reports, etc.) in a timely manner. Refer to the Contract Data Requirements List (CDRL) to determine if the contractor is delinquent on these submissions.

3. Contractor Resource Control: The contractor is to use the hours authorized in a manner so as to provide the required support throughout the intended period of performance. The FAE shall compare on a monthly basis the contractor's labor usage rate with the labor allocated for the effort. Any discrepancies will be promptly brought to the attention of appropriate contractor program manager, the FAC and the Contracting Officer.

4. Performance by Functional Area: This area should list the functional areas called out for in the order.

5. Overall Evaluation of Contractor's Performance: This evaluation should summarize the performance evaluations of all areas on the order.

3. Only ratings of "Excellent," "Satisfactory," "Marginal" and "Unsatisfactory" will be used. If the rating is other than "Satisfactory," the evaluation will be accompanied by a short narrative.

QUARTERLY SURVEILLANCE LOG

Evaluation Period: _____ through _____

Contractor Name:	XYZ CORP	Ordering Office:	ESC/XXX
GSA Schedule	TBD	FAE Name:	JANE DOE
No:			
ITSP Order No.	TBD	FAE Phone No:	377-XXX

PERFORMANCE AREA	EVAL*
1. TECHNICAL PERFORMANCE:	
A. Contractor's Understanding of Program Objectives	
B. Contractor's Ability to Identify Program Problems/Issues	
C. Quality of Data Deliverables	
D. Working Relationship of Contractor's Managers & Staff With Program Office Personnel	
E. Stability of Contractor's Staff, Especially Key Personnel	
2. SCHEDULE/TIMELINESS OF DELIVERABLES:	
A. Responsiveness of Contractor's Task Manning	
B. Timeliness of Data Deliverables	
3. CONTRACTOR RESOURCE CONTROL:	
4. PERFORMANCE BY FUNCTIONAL AREAS:**	
A.	
B.	
C.	
D.	
COMMENTS:	
5. OVERALL EVALUATION OF CONTRACTOR PERFORMANCE:	

*Excellent - Satisfactory - Marginal - Unsatisfactory (Any rating other than Satisfactory will be accompanied by a narrative)

**Examples: Acquisition Engineering, Specialty Engineering, Logistics Support

Reviewed by FAE: _____ Reviewed by FAC: _____
Signature/Date Signature/Date

FORMAT FOR ITSP CONTRACT DATA REQUIREMENTS LIST (CDRL)

The ITSP CDRL will consist of, **as a minimum**, the Funds and Man-Hour Expenditure Report (DI-FNCL-80331). This data item is **mandatory** and will be a part of each ITSP order. The Progress Report (DI-H-25772B) and Manning Report (DI-MGMT-80212A) data items descriptions (DID) that were used on the TEMS IV contract have been cancelled with no replacement. These two data items **cannot** be ordered. You may include any other data items applicable to your order.

Included is the required format for the Funds and Man-Hour Expenditure Report. The information is required to be typed on a DD Form 1423, Contract Data Requirements List. You need to provide information for Blocks E, F, 5, 6, 14, 15, G, H, I and J. **DO NOT** change the wording of any of the other blocks.

NOTE: ESC/XPK will receive this data item electronically. If you require an electronic submission also, make sure you provide an email address in the Block 16 Remarks. Also remember to add a Repro copy to Block 14b.

ATCH 6

CONTRACT DATA REQUIREMENTS LIST (1 Data Item)						Form Approved OMB No. 0704-0188							
Public reporting burden for this collection of information is estimated to average 110 hours per response, including the time for reviewing instructions, searching existing data sources, gathering and maintaining the data needed, and completing and reviewing the collection of information. Send comments regarding this burden estimate or any other aspect of this collection of information, including suggestions for reducing this burden, to Department of Defense, Washington Headquarters Services, Directorate for Information Operations and Reports, 1215 Jefferson Davis Highway, Suite 1204, Arlington, VA 22202-4302, and to the Office of Management and Budget, Paperwork Reduction Project (0704-0188), Washington, DC 20503. Please DO NOT RETURN your form to either of these addresses. Send completed form to the Government Issuing Contracting Officer for the Contract/PR No. listed in Block E.													
A. CONTRACT LINE ITEM NO. SEE BLOCK 16		B. EXHIBIT A		C. CATEGORY: TDP TM OTHER X									
D. SYSTEM/ITEM ITSP			E. CONTRACT/PR NO. (Enter Order No.)		F. CONTRACTOR (Enter Company Name)								
1. DATA ITEM NO. A001		2. TITLE OF DATA ITEM Funds and Man-Hours Expenditure Report				3. SUBTITLE							
4. AUTHORITY (Data Acquisition Document No.) DI-FNCL-80331/T			5. CONTRACT REFERENCE (Enter SOO Para Reference)			6. REQUIRING OFFICE (Enter Your Office Symbol)							
7. DD 250 REQ LT		9. DIST STATEMENT REQUIRED C		10. FREQUENCY MONTHLY		12. DATE OF FIRST SUBMISSION SEE BLOCK 16							
8. APP CODE N		11. AS OF DATE		13. DATE OF SUBSEQUENT SUBMISSION SEE BLOCK 16		14. DISTRIBUTION							
16. REMARKS Block A: The following CLINs apply to CDRL A001: 0002, 0012, 0022 & 0032 Block 4: Format will be as specified in Microsoft Excel file itspsum.xls located at http://www.herbb.hanscom.af.mil (click on Biz Opportunities and select Information Technology Services Program). Block 12: Fifteen (15) work days after end of first calendar month. Block 13: Monthly thereafter. For last submission or final report, closeout shall be submitted ninety (90) calendar days after completion of period of performance as specified in Section F of the basic contract. Block 14: Unless otherwise specified, submission will be provided electronically (soft copy) in Microsoft Excel 5.0/95 Workshop format. The ESC/XPK submission will be emailed to the following addressees: <u>Susan.Kennison@hanscom.af.mil</u> <u>Christos.Scondras@hanscom.af.mil</u> <small>NOTE: AS PART OF THE BILLABLE EFFORT UNDER THE ITSP TASK ORDERS, CONTRACTORS ARE REQUIRED TO RECORD ACTUAL "DIRECTLY-BILLABLE" HOURS IN A WEB-BASED GOVERNMENT DATABASE CALLED THE ACTIVITY RESOURCE TRACKING SYSTEM (ARTS). ARTS IS DESIGNED TO ALLOW THE GOVERNMENT TO ALLOCATE ESTIMATED COSTS TO FUNCTIONAL AREAS, ACTIVITIES AND COST OBJECTS TO SUPPORT THE CENTER'S ACTIVITY-BASED MANAGEMENT INITIATIVE. ARTS REQUIRES MANHOURS WORKED TO BE ALLOCATED TO A CHOICE OF GOVERNMENT DEFINED ACTIVITIES. CONTRACTOR EMPLOYEES AND/OR ORDER TASK LEADERS WILL INPUT THIS INFORMATION DIRECTLY INTO THE AUTOMATED TOOL USING DESKTOP COMPUTERS, IN ACCORDANCE WITH INSTRUCTIONS PROVIDED BY THE GOVERNMENT. ARTS WILL BE IMPLEMENTED INCREMENTALLY AT HANSCOM AFB BY TWO-LETTER ORGANIZATION. CONTRACTORS WILL NOT BE REQUIRED TO PROVIDE INFORMATION UNTIL THE SYSTEM HAS BEEN IMPLEMENTED FOR GOVERNMENT EMPLOYEES IN THE ORGANIZATION WHICH THEY SUPPORT.</small> <small>UNLIKE OTHER DELIVERABLES IDENTIFIED IN THIS CDRL, THE ARTS INPUTS ARE NOT DELIVERED BY THE 15TH OF EVERY MONTH AS PART OF THIS FUNDS AND MANHOURS EXPENDITURE REPORT. THE INPUTS ON THE GOVERNMENT COMPUTER NETWORK WILL BE ACCOMPLISHED BY CONTRACTOR PERSONNEL AND/OR THEIR ORDER TASK LEADERS ON A DAILY BASIS IF POSSIBLE, BUT NO LATER THAN ON A WEEKLY BASIS (EXTENUATING CIRCUMSTANCES SUCH AS LONG-TERM TDY, VACATION, ETC., EXCEPTED).</small>						(Enter Your Office Symbol)							
						ESC/XPK							
15. Total						0 1 1							

G. PREPARED BY (Enter signature of individual who prepared the DD Form 1423)		H. DATE (Enter date signed)		I. APPROVED BY (Enter signature of individual who approved the DD Form 1423)		J. DATE (Enter date signed)	
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17. PRICE GROUP
18. ESTIMATED TOTAL PRICE

INSTRUCTIONS FOR COMPLETING DD FORM 1423

(See DoD 5010.12-M for detailed instructions.)

FOR GOVERNMENT PERSONNEL

- Item A. Self-explanatory
- Item B. Self-explanatory
- Item C. Mark (X) appropriate category: TDP - Technical Data Package; TM - Technical Manual; Other - other category of data, such as "Provisioning", "Configuration Management", etc.
- Item D. Enter name of system/item being acquired that data will support
- Item E. Self-explanatory (to be filled in after contract award).
- Item F. Self-explanatory (to be filled in after contract award).
- Item G. Signature of preparer of CDRL.
- Item H. Date CDRL was prepared.
- Item I. Signature of CDRL approval authority.
- Item J. Date CDRL was approved.
- Item 1. See DoD FAR Supplement Subpart 4.71 for proper numbering.
- Item 2. Enter title as it appears on data acquisition document cited in Item 4.
- Item 3. Enter subtitle of data item for further definition of data item (optional entry).
- Item 4. Enter Data Item Description (DID) number, military specification number, or military standard number listed in DoD 5010.12-L (AMSDL), or one-time DID number, that defines data content and format requirements.
- Item 5. Enter reference to tasking in contract that generates requirement for the data item (e.g. Statement of Work paragraph number).
- Item 6. Enter technical office responsible for ensuring adequacy of the data item.
- Item 7. Specify requirement for inspection/acceptance of the data item by the Government.
- Item 8. Specify requirement for approval of a draft before preparation of the final data item.
- Item 9. For technical data, specify requirement for contractor to mark the appropriate distribution statement on the data (ref. DoDD 5230.24).
- Item 10. Specify number of times data items are to be delivered.
- Item 11. Specify as-of date of data item, when applicable.
- Item 12. Specify when first submittal is required.
- Item 13. Specify when subsequent submittals are required, when applicable.
- Item 14. Enter addressees and number of draft/final copies to be delivered to each addressee. Explain reproducible copies in Item 16.
- Item 15. Enter total number of draft/final copies to be delivered.
- Item 16. Use of additional/clarifying information for Items 1 through 15. Examples are: Tailoring of documents cited in Item 4; Clarification of submittal dates in Items 12 and 13; Explanation of reproducible copies in Item 14; Desired medium for delivery of the data item.

FOR THE CONTRACTOR

Item 17. Specify appropriate price group from one of the following groups of effort in developing estimated prices for each data item listed on the DD Form 1423.

a. Group I. Definition - Data which is not otherwise essential to the contractor's performance of the primary contracted effort (production, development, testing, and administration) but which is required by DD Form 1423.

Estimated Price - Costs to be included under Group I are those applicable to preparing and assembling the data item in conformance with Government requirements, and the administration and other expenses related to reproducing and delivering such data items to the Government.

b. Group II. Definition - Data which is essential to the performance of the primary contracted effort but the contractor is required to perform additional work to conform to Government requirements with regard to depth of content, format, frequency of submittal, preparation, control, or quality of the data item.

Estimated Price - Costs to be included under Group II are those incurred over and above the cost of the essential data item without conforming to Government requirements, and the administration and other expenses related to reproducing and delivering such data item to the government.

c. Group III. Definition - Data which the contractor must develop for his internal use in performance of the primary contracted effort and does not require any substantial change to conform to Government requirements with regard to depth of content, format, frequency of submittal, preparation, control, and quality of the data item.

Estimated Price - Costs to be included under Group III are the administrative and other expenses related to reproducing and delivering such data item to the government.

d. Group IV. Definition - data which is developed by the contractor as part of his normal operating procedures and his effort in supplying these data to the Government is minimal.

Estimated Price - Group IV items should normally be shown on the DD Form 1423 at no cost.

Item 18. For each data item, enter an amount equal to that portion of the total price which is estimated to be attributable to the production or development for the Government of that item of data. These estimated data prices shall be developed only from those costs which will be incurred as a direct result of the requirement to supply the data, over and above those costs which would otherwise be incurred in performance of the contract if no data were required. The estimated data prices shall not include any amount for rights in data. The Government's right to use the data shall be governed by the pertinent provisions of the contract.

ITSP REQUIREMENTS PACKAGE REVIEW CHECKLIST:

(Please allow up to at least 2 days, if needed, for ESC/XPK review!!)
(Submit electronic packages to Susan Kennison & Capt Mark Restad)

When submitting your ITSP RFQ package for ESC/XPK review and “control number” assignment, please include the following:

- __RFQ Cover Letter (MS Word doc.)
- __Statement of Objectives (SOO); (MS Word doc.)
- __Evaluation Criteria (for best value selection); (MS Word)
- __CDRL requirements included in RFQ
- __Draft DD Form 254 (if available)
- __List of BPA Team Leads who you contemplate soliciting (ensure that they are NOT all TEMS/SETA incumbents)
- __Short memo describing your market research evaluation and rationale leading you to your choice of BPA Teams for RFQ
- __MFR confirmation that you contacted the BPA Teams you plan to solicit, and each has indicated their intention to propose
- __Draft PR (if available) with A&AS code(s) (formerly CAAS code(s)), listed for fund cites to be used (or memo with codes)
- __That RFQ/SOO indicates whether awardee will need to bring own computers for collocated work, or whether such will be provided by user as Base Support
- __User has reviewed the ITSP Ordering Guide & User’s Guide for assistance in preparing RFQ documentation
- __Does the RFQ cover letter request (if applicable) possible discounted rates

ATCH 7

ITSP FINAL REVIEW FOR ORDER AWARD CHECKLIST:

When submitting your final ITSP down-select task order award(s) for ESC/XPK PCO signature, please include the following:

- __ Order(s) completed in CONWRITE and structured using the guidelines in the ITSP Ordering Guide.
- __ Ensure all pertinent DCMC/DFAS data from the awardee's BPA text is included, as well as all CLIN amounts from proposal.
- __ Ensure "Program: ITSP" is included either on the face page of the order award, or on page 2.
- __ Include the BPA No. (under which this task order emanates) on pg. 2, as well as the original ESC/XPK control number you had.
- __ Include the FAE & Alt FAE names, office symbols, and phone numbers on pg. 2 of the order.
- __ Ensure ESC/XPK is included on your distribution list so that we receive a copy of the order and all future modifications.
- __ Ensure you've included a separate memo to ESC/XPK grouping the percentages of labor you've ordered into their respective functional areas (e.g.: DI, CE, FM, etc.); see ITSP User's Guide.
- __ If DD254 not available at award, ensure it's added to order (when required) via the next modification.
- __ Attach contractor-proposed SOW, as well as proposed labor category support table and respective loaded rates, to order.
- __ Submit all FAE-related paperwork (see ITSP User's Guide) with file documentation accompanying your order(s).
- __ Include a brief memorandum describing the evaluation results and/or rationale for the selection(s) you've deemed best value.
- __ Certified PR(s) and applicable A&AS codes for your support.
- __ User has reviewed the ITSP Ordering Guide & User's Guide in preparing this award package.
- __ Ensure all math and CLIN amounts correlate with proposal.
- __ Ensure DD Form 350 information is correct to include info required by SAF/AQC policy letter (see ITSP Ordering Guide).

ADVISORY AND ASSISTANCE SERVICES (A&AS) CODES

Codes indicate the predominant type of service Support Contractors and MITRE are providing:

MP (Management and Professional Support Services): Provide assistance, advice, or training for the efficient and effective management and operation of organizations, activities (including management, scientific and engineering support for R&D activities) or systems. These services are normally closely related to the efforts that support or contribute to improved organization or program management, logistics management, project monitoring and reporting, data collection, budgeting, accounting, auditing, and administrative/technical support for conferences and training programs. Also includes services to review and assess existing managerial policies and organizations; develop alternative procedures, organizations and policies; and to examine alternative applications and adaptations of existing or developing technologies.

SA (Studies, Analyses and Evaluations): Provide organized analytic assessments/evaluations in support of policy development, decision making, management or administration. Includes studies in support of R&D activities. Also includes contractor support for models, methodologies, and related software supporting studies, analyses of concepts, plans, tactics, forces, systems, policies, personnel management methods and programs; studies specifying the application of information technology and other information resources to support mission and objectives; technology assessments and management and operations research studies in support of research, development, test and evaluation (RDT&E) objectives; evaluation of foreign force and equipment capabilities, foreign threats, net assessments and geopolitical subjects; analyses of material, personnel, logistics and management systems; and environmental impact statements.

ET (Engineering and Technical Services): Provide a service to support the system program office or manager during the acquisition cycle by providing such services as systems engineering and technical assistance to ensure the effective operation and maintenance of a weapon system or major system to provide direct support of a weapon system that essential to R&D, production, or maintenance of the system. Examples include, but are not limited to: developing test requirements; evaluating test data and overseeing test design; developing work statements, determining parameters, overseeing other contractors operations and resolving technical controversies. Also services of contractor technical representatives providing assistance and training necessary to maintain and operate fielded systems, equipment and components (included software when applicable) at design or required levels of effectiveness.